

DOCUMENT RESUME

ED 144 254

24

EA 009 971

TITLE Declining Enrollment: Implications for South Carolina School Districts.

INSTITUTION South Carolina State Dept. of Education, Columbia. Office of Research.

SPONS AGENCY Bureau of Elementary and Secondary Education (DHEW/OE), Washington, D.C.

PUB DATE Oct 77

NOTE 47p.

EDRS PRICE MF-\$0.83 HC-\$2.06 Plus Postage.

DESCRIPTORS *Declining Enrollment; Educational Facilities; Educational Finance; *Educational Planning; Elementary Secondary Education; *Enrollment Projections; Enrollment Trends; Instructional Programs; Public School Teachers; Reduction in Force; School Closing; School Community Relationship; *School Demography; *School Districts

IDENTIFIERS Elementary Secondary Education Act Title IV C; *South Carolina

ABSTRACT

Continuing enrollment decline will affect South Carolina school districts in varying degrees during the next five to ten years. Demographic forecasting will remain an essential element in predicting the degree to which specific districts will be affected by enrollment changes. Every district will need to build a data base and develop the capacity for detailed analysis of local conditions in order to formulate effective policy. Planning for the future is absolutely essential for every South Carolina school district. This booklet reviews the broad scope of problems associated with enrollment decline, including the areas of staffing, instruction, finance, and facilities, as well as school closing and school community relations. (Author/DS)

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DECLINING ENROLLMENT:
IMPLICATIONS FOR SOUTH CAROLINA SCHOOL DISTRICTS

Division of Administration and Planning
Robert R. Hill, Deputy Superintendent

Office of Research
Paul D. Sandifer, Director

South Carolina Department of Education
Cyril B. Busbee, State Superintendent
Columbia, South Carolina

October, 1977

This publication was developed by the College of Education, University of South Carolina, under contract with the South Carolina Department of Education. Funds for this project were made available through Title IV-C, ESEA.

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Planning for the future of public education in South Carolina has taken on a high degree of sophistication in recent years in order to improve both the educational and management/financing aspects of the school program. The successes resulting from this planning program and subsequent implementation of the plans have resulted from the leadership of the State Board of Education, the commitment of the Legislative and Executive branches of State Government, the skill, industriousness and loyalty of the State Department of Education staff, and the willingness of local school districts to adopt and apply progressive methods.

This document is important in the planning concept, although its content is in sharp contrast to many of our more recent planning efforts. Whereas a great number of other planning efforts have been concerned with expansions of various kinds, this publication deals with the equally important subject of contraction in such areas as physical facilities and educational programs in order to adapt to the inevitable decline in public school enrollments resulting from declining birth rates.

I commend this study -- which was performed by the College of Education at the University of South Carolina under contract to the Department of Education -- to all who share concern for effective and efficient management of public education in the Palmetto State.

Cyril B. Busbee
State Superintendent of Education

Declining enrollments in the public elementary and secondary schools of the United States during the past five years have created unique and perplexing problems for school boards and administrators. The problems are unique to districts which were geared to rapid expansion of facilities and programs to accommodate the postwar baby boom of the fifties and sixties. The problems are perplexing to the boards which have had no previous experience in closing schools, reducing staffs or deleting programs. Some boards have faced a dearth of proven policies for dealing with decline and have been forced to develop policy extemporaneously, at times virtually under duress. Although the problems associated with the unprecedented growth of the public schools during the fifties and sixties were enormous, the process of adapting to decline during the coming decade may present even more serious challenges to many school systems.

This booklet reviews the broad scope of problems associated with enrollment decline. Conclusions drawn are general and may or may not be applicable to specific South Carolina school districts. Nevertheless, some light is shed on the basic questions of the impact of enrollment decline on school districts and on the process of planning strategies and developing policy for coping with the decline.

The able assistance of Flora Hopkins and William W. Savage in the preparation of this booklet is gratefully acknowledged. Mrs. Hopkins assisted in researching the topics and typed the manuscript. Dr. Savage provided valuable editorial assistance.

THE PROBLEM

The number of pupils enrolled in the public elementary and secondary schools of the nation declined from 45,903,000 to 44,700,000 during the period between 1970-71 and 1975-76. Thirty-nine of the 50 states, including South Carolina, experienced declining public-school enrollments during this time. The decline in enrollment in the United States from the Fall of 1970 to the Fall of 1975 was 2.6 percent.¹ The decline in the public schools of South Carolina during the same period was 2.5 percent.²

Substantial evidence based on the relatively low fertility rate of the late 1960's and early 1970's indicates a continued decline in the total school-age population well into the 1980's. More babies were born in the United States in 1976 than in 1975, however, and more during January and February, 1977, than were born in the corresponding period of 1976. Births in South Carolina during 1976 exceeded those of the previous year for the first time since 1971. Nevertheless, there were 5,333 fewer births in the state in 1976 than in 1971.³

While the recent increase in the number of births is probably due in part to an increase in the number of women in the primary child-

¹Allan Odden and Phillip E. Vincent, The Fiscal Impact of Declining Enrollments: A Study of Declining Enrollments in Four States-Michigan, Missouri, South Dakota and Washington (Denver: Education Commission of the States, 1976), pp.1-2.

²Ibid.

³South Carolina Department of Health and Environmental Control, Report of the Live Births by County of Residence by Race and Sex, South Carolina, 1970-76.

bearing age, and in part by women who postponed having children until they had worked a few years, the intriguing question remains as to whether or not a societal trend toward increased child-bearing is developing. Because of the large number of women of child-bearing age, a very slight change in the fertility rate could produce dramatic change in school-age children in the mid and late 1980s. Regardless of fertility rates, however, decline will be a fact for most school districts during the coming decade.

Migration is one of the variables which may affect public school enrollments. The nation has experienced an increasingly unequal migration pattern over the past 12 years. The South and West "sunbelt" regions have experienced a sizable net in-migration at a time when the Northeast and North Central states have experienced a sizable out-migration.

The most mobile segment of the American population is the 18-to-20-year age group, persons in their early career stages who are marrying and starting families. Their migration rate is more than four times the national average of one major move every five years. Members of this age group are the most frequent local movers and they tend to concentrate in certain geographic areas. New communities with low to moderately-priced housing units tend to have families with more school-age children than do older communities. The high movement rate of young people and their propensity toward geographic concentration gives this group the potential for a dramatic impact on schools.

Other variables which affect public school enrollments are economic and attitudinal by nature. The availability and attractiveness

of employment opportunities influence the location of families with school-age children. The attitude toward the public schools, the perceived quality of programs, and the competitiveness of nonpublic schools also affect the public school enrollments.

Data in the 1977 edition of The Condition of Education⁴ indicate that national patterns of private school enrollments show substantial differences among geographical regions. Such enrollments traditionally have been higher in the Northeast and Central regions than in the West or Southeast. Total private elementary and secondary enrollment in the nation has increased since 1970 although regionally enrollment in the Northeast has declined while increasing in the Southeast. As a percentage of enrollment, however, private-school enrollment in the Southeast still has not equaled that of the Northeast.

Districts Most Likely to Experience Decline

Geographical location and district size are two variables which are used frequently in studies designed to determine the types of school districts which are most affected by declining enrollments. Studies sponsored by the Education Commission of the States and conducted in Michigan, Missouri, South Dakota and Washington indicated that, while all sizes of school districts experienced some enrollment decline, very large and very small districts were affected most.⁵ In these studies

⁴U.S. Department of Health, Education, and Welfare. The Condition of Education in the United States, by Mary A. Golladay. vol.3 (Washington, D.C.: Government Printing Office, 1977), pp.74-76.

⁵Odden and Vincent, The Fiscal Impacts of Declining Enrollments: A Study of Declining Enrollments in Four States-Michigan, Missouri, South Dakota and Washington, pp.9-14.

the standard deviation of the variable, "percent pupil change," was significantly larger for districts with fewer than 500 students. Thus, while many very small districts had enrollment drops, many small districts also had enrollment increases. Smaller districts seem to be relatively less stable; they tend either to grow or decline significantly.

In most states the smallest school districts are found in predominately rural areas; whereas, the largest districts are usually located in metropolitan areas. Among districts hardest hit by decreasing enrollments have been central-city types. Where metropolitan areas consist of a central-city district surrounded by a "collar" of suburban districts, a shift in pupil population often occurs, resulting in pupil increases in the "collar" districts and an accompanying decline in the central-city district.

Projected Trends for South Carolina

South Carolina's State Department of Education, using the cohort survival technique, projects a state public school enrollment (grades 1-12) change from 614,830 pupils in 1976 to 560,322 in 1983. This change represents a projected total state public school enrollment decrease of 54,508 pupils between 1976 and 1983.⁶ The projected enrollment for 1983 will be approximately equal to the enrollment in the state during the 1956-57 session. Projections by the United States Office of Education indicate that enrollment for the nation in 1983 will approximate

⁶South Carolina Department of Education, Enrollment Projections for South Carolina Schools 1977 through 1983 (Columbia: State Department of Education, 1977), pp.8-9.

the national enrollment of 1962-63.

Private school enrollment in South Carolina for grades 1-12 totaled 44,111 in the Fall of 1975, an increase of 1,271 pupils over the 1972 figure. Because of the lack of a reliable data base, the State Department of Education used a constant figure (44,111 pupils) in projecting private school enrollment to 1983.⁷

Profiles of projected enrollments which were developed by the State Department of Education are shown in Figures 1-4 on page 8. While total state enrollments in grades 1-12 (Figure 1) indicate a steady decline through 1983, a wave with an accompanying "crest and trough" effect is evident to some degree in grades 7 and 8 (Figure 2) and becomes prominent in grades 9-12 (Figure 4). Enrollment in the elementary grades is projected to decline during the next five years but not as rapidly as it did during the early seventies.

The combined state enrollment for grades 7 and 8 probably peaked in 1976-77 and is projected to decline by 12.85 percent (14,285 pupils) during the four-year period beginning in the Fall of 1977, followed by a slight upturn of 2.4 percent (2,320 pupils) in the projected enrollment for the Fall of 1982.⁸

Grades 9-12 (Figure 4) enrollment projections present a more graphic illustration of the crest and trough effect.

⁷Ibid., p.8.

⁸Data provided by the South Carolina State Department of Education.

Table 1
 South Carolina
 Projected Enrollment, Grades 9-12

<u>Year</u>	<u>Projected Enrollment</u>	<u>Change From Previous Year</u>
1977-78	193,091	+1114
1978-79	193,920	+ 829
1979-80	191,031	-2889
1980-81	185,454	-5577
1981-82	178,703	-6751
1982-83	171,656	-7047

Enrollment in Grades 9-12 is expected to peak in 1978-79 at 193,920, followed by a sharp decrease to an expected 171,656 pupils by 1982-83. The projected enrollment decline of 19,375 high school pupils over a three-year period (1980-81 to 1982-83) shown in Table 1 appears to represent the greatest potential for the displacement or reassignment of teachers.⁹

⁹Ibid.

Source:

South Carolina Department of Education, Enrollment Projections for South Carolina Schools 1977 Through 1993 (Columbia: State Department of Education, 1977).

FIGURE 1
TOTAL STATE ENROLLMENT
GRADES 1-12
1972-73 THROUGH 1982-83

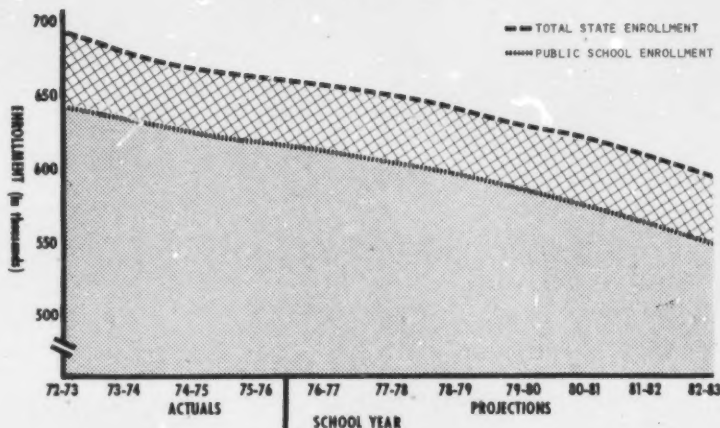


FIGURE 2
TOTAL STATE ENROLLMENT
GRADES 1-6
1972-73 THROUGH 1982-83

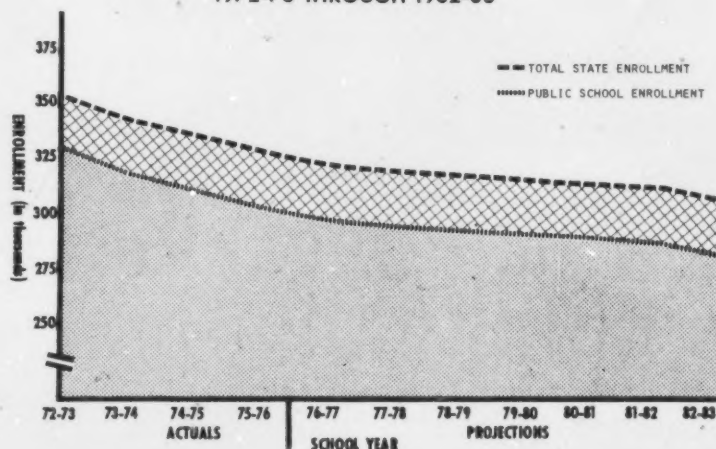


FIGURE 3
TOTAL STATE ENROLLMENT
GRADES 7 AND 8
1972-73 THROUGH 1982-83

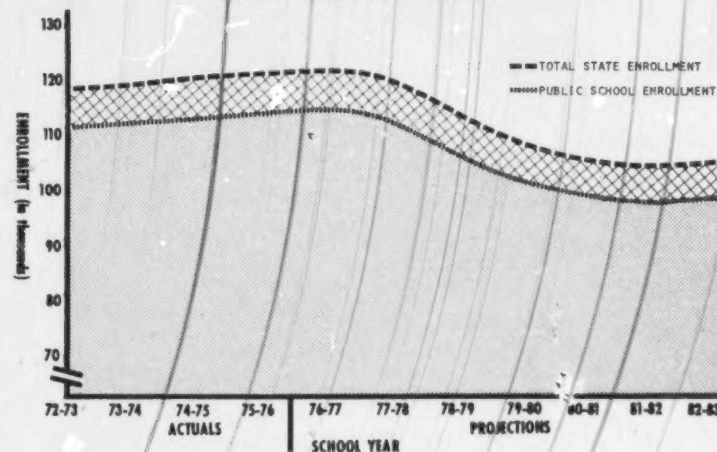
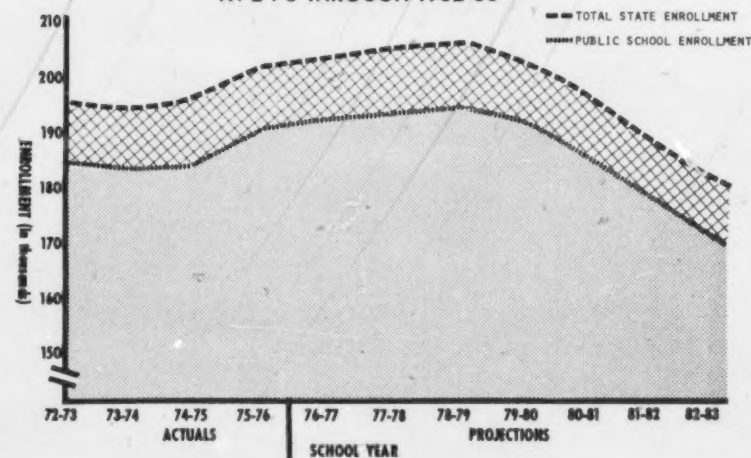


FIGURE 4
TOTAL STATE ENROLLMENT
GRADES 9-12
1972-73 THROUGH 1982-83



Two conclusions seem justified. First, total school enrollments in South Carolina will continue to decline throughout the 1970's and into the early 1980's. The most dramatic drop will be in grades 9 to 12 from 1980 to 1983. Any attempt to project total enrollments beyond the mid 1980's, however, becomes more a matter of conjecture. Second, the decline in enrollment will not be distributed uniformly throughout the nation or state. While some districts will experience sharp declines in enrollments, some districts will remain relatively static and others will in fact experience rapid growth.

The implications for planning and analysis at the district level are obvious. If a board and its superintendent are able to predict enrollment trends accurately, their chances of developing strategies and policy for coping effectively with the problems associated with decline or growth will be increased greatly.

Long-Term Planning

The implications of a general enrollment decline for education are far broader than the problems associated with closing schools. As Katherine Eisenberger, National Director of the Demographic Awareness Project of the American Association of School Administrators said, "the most critical issue facing school leaders today is maintaining education as a national priority."¹⁰ She observed that new priorities are being created in a society in which there soon will be more adults over 55 than school-age youngsters. Demands for expanded health care, better police protection, mass transportation and improved housing may command a higher priority than improving the educational opportunity of the nation's youth. Eisenberger sees the priority-status of education in the decade ahead in the following context: "As the constituency served by a K-12 education system decreases, the day will soon arrive when schools no longer will face decline, but neglect."¹¹

Short-Term Planning

Fortunately, many of the immediate short-term implications of declining enrollments, both positive and negative, can be identified and dealt with. The tenth-grade student of 1992 has been born; administrators who utilize birth data have a five-year period in which to prepare for each first grade. The various types of demographic data

¹⁰Katherine E. Eisenberger, "New Population Trends Changing America," The School Administrator 37 (July-August 1977): 19.

¹¹Ibid.

available to school districts have improved the planning capabilities of districts. Yet, each year administrators are facing the critical logistical question of whether or not their planning will forecast accurately the appropriate numbers of teachers and classrooms needed by the system.

During the next decade, enrollment will increase in some communities but most school districts in the nation will experience varying degrees of decline. South Carolina fits the national pattern. The projected enrollment changes for South Carolina school districts from 1975-76 to 1982-83 range from an increase of 45.8 per cent in one district to a 27 per cent decrease in another.¹² Only 16 of the 92 school districts in South Carolina are projected to show increases in enrollment between 1975-76 and 1982-83. A decline of 9.5 per cent in total state enrollment for the period is projected.

Adjusting to decline requires a set of skills which most superintendents and boards have had little reason to develop. During the last two decades, districts have adjusted well to unprecedented growth; but, according to Donald M. Thomas, there is less difficulty in adjusting to growth than in adjusting to decline.¹³

There is a strong case made for the argument that decline requires greater skill, better judgment, a stronger sense of community, and a higher order of leadership than growth does. It is easy to adjust to growth. If you make mistakes, time will generally correct them....In decline however, time

¹²Data provided by the South Carolina State Department of Education.

¹³M. Donald Thomas, Declining School Enrollments (Salt Lake City, Utah: ERIC Document Reproduction Service, ED 117 832).

aggravates mistakes. It makes it much harder to achieve the proper proportions of the system as it is the achieving of these proper proportions which is one of the major functions of leadership.

Numerous procedures for short-term high intensity planning have been developed in school districts throughout the country. While each plan seems to have its unique qualities, threads of commonality appear in most of the plans. Generally, the plans developed for districts which anticipate decline include the following major components:

1. an on-going community analysis;
2. school enrollment studies and projections; and
3. a multi-year time table for planned school closing and re-organization in the event such action becomes necessary.

The community analysis Indicators of impending enrollment change are visible in a community several years before the number of first-grade sections decreases. They include land-use changes and shifts in residential patterns, economic factors (especially employment trends), mobility rates and changes in real estate values. The age of the community and changes in highway and transportation patterns affect enrollments also.

Staff studies of these and similar indicators can yield valuable insight into community development and provide the administrator with valuable planning information. Staff or consultant services are expensive and time consuming; and many districts seem unable to afford detailed studies of their communities. On the other hand, a simple instrument known as the Keough Indicator Survey Scale can provide the administrator with a method of quickly identifying the early warning signs of change in district enrollment patterns. Developed by William A. Keough, Jr., Superintendent of the Bedford, Massachusetts

schools and published in the Executive Handbook of the American Association of School Administrators, Declining Enrollment: What To Do,¹⁴ the scale consists of fifteen questions to be answered about the school system and community. Decline is indicated when certain questions are answered "yes" and others "no". The scale is used with the cohort survival technique for short term enrollment projections.

School enrollment studies and projections The school enrollment study is concerned with a specific segment of the community's population, those individuals of pre-school and school age. Typically, the components of enrollment studies include analyses of the following items:

1. ratios of non-public school to public school enrollment;
2. holding power of the district's schools, including dropout/retentions/acceleration studies;
3. changes in district or attendance area boundaries; and
4. non-resident pupils attending schools in the district.

Information contained in the enrollment studies provide the data base for projecting enrollments for the district on a short term, five-to-ten-year basis.

Historically, 20- and 30-year national enrollment projections have been unreliable. Neither the enrollment boom of the fifties nor the sharp decline of the sixties was foreseen very far in advance of their occurrence. Short-term, five-to-ten-year projection methods, however, have been developed which utilize absolute figures and may be

¹⁴American Association of School Administrators, Declining Enrollments: What to Do (Arlington, Va.; American Association School Administrators, 1974), pp.43-47.

expected to yield fairly reliable estimates of future enrollments. These methods usually assume the continuation of present or recent trends. Thus, the reliability level is dependent to some extent upon the continuation of existing trends or upon the modification of estimates based upon the identification of new trends.

Methods commonly used to project enrollments at the district level include the cohort-survival ratio, the analogy method, saturation analysis and the analysis of census data. Each of the several methods has unique strengths and weaknesses which should be recognized when a method is used separately or in combination with other methods.

The cohort-survival method The cohort- or average-survival ratio technique is one of the methods used most frequently in projecting enrollments. The process uses an analysis of historical data modified by current trends. It lumps together most of the factors affecting future enrollments with the exception of birth rates which are treated separately. By using past records, the ratios of births-to-first-grade enrollments six years later are computed for a specific period, usually five years. An average of these ratios is then used to project future first grade enrollments by multiplying the ratio by the number of births for a given year. The product is the projected first-grade enrollment six years after the given year. The cohort survival is then determined from past enrollment data. It is the ratio of the number of pupils in one grade level in a specific year to the number of pupils in the next higher grade the following year. An average ratio for several years is established for all grades and, when applied to current enrollment figures, yields the projected future

enrollments. A matrix is used to show these relationships. On the district level, the average survival ratio can be adjusted to take into account local trends such as non-public school enrollments, changes in employment or building patterns, migration and transportation changes. Computations required for the theoretical model are relatively simple. When the model is used in conjunction with practical knowledge and specific information about the district, the combination can provide the administrator with a very useful tool for predicting short-term future enrollments. Detailed steps for using several variations of the survival-ratio technique are contained in the publication listed in the bibliography included in this booklet.

The analogy method The analogy method is based on the assumption that if two districts are similar what happens in one will happen in the other. The method has limited application due to the problems of identifying districts with enough similar characteristics. Its use in combination with the cohort survival technique may be helpful in the early detection of the counter-trend variable which would affect survival ratios.

Saturation analysis The saturation analysis method is useful to the rapidly-developing district in planning the location of schools far enough in advance to purchase adequate sites at affordable costs. The process seeks to determine the ultimate school enrollment which might result if all land in the district were developed completely. Areas to be developed for industrial, commercial, recreational and residential purposes are ascertained with the cooperation of local planners. Pupil-density ratios are estimated for the various types of dwelling

units in the residential areas and are translated into projected enrollments. The process is limited to those districts in which some degree of coordinated community planning takes place.

The analysis of census data The analysis of census data is based on determining the average increment of change over a period of time and using the increment as a projection base. The major criticism of the process is that it does not take into account the fact that some factors causing change may not continue to operate in the same way.

The development of enrollment projections in South Carolina by school district personnel should provide valuable comparative data for use with the projections by the State Department of Education. Total state enrollment by districts is computed annually by the Department of Education and distributed to superintendents but school district personnel are in a position to be more aware of variables affecting a specific community than are persons at the state level. Conversely, the state generally utilizes a more statistically sophisticated projection process. The two figures should be complementary and provide parameters or "bracket" estimates for planning purposes.

School closing time-table Once it has been determined that projected enrollment decline may require the closing of some schools, the board should be fully apprised of the situation and of its ramifications. The superintendent and the board should begin developing a comprehensive plan to inform the public of the existing circumstances and to systematically determine which schools, if any, are to be closed, and the sequence and timing of the closings.

Strategies for involving the media in communicating demographic data and projected estimates of capital and operating costs are logical parts of the plan. The appointment of a citizen's task force, arrangements for teacher visitations to other schools within the district and curriculum studies should be considered as parts of the plan. The amount of time needed will vary with the circumstances existing in a specific district, however, a three-year time line seems highly desirable.

Community Reaction to Decline

Declining enrollments and spiraling costs eventually bring about the need for closing schools. School closings are almost always viewed negatively by parents, pupils and teachers. Vocal advocates of fiscal accountability often seem strangely silent when boards and administrators need support in justifying school closings. Regardless of its age or condition, a school has sentimental value for many other area residents; and its closing can produce the most controversial community political issue of the year. As educators realize, the decision to close a school has the potential for developing hostility, organized opposition and community conflict.

The degree and type of opposition may vary with the type of school. Apparently, some districts have found the opposition to closing junior high schools to be less than the opposition to closing either elementary or senior high schools. Parents of elementary school pupils are likely to support strongly the community school concept and usually view the closing of the small elementary school as a psychological and physical threat to the safety of their children. Their opposition to the in-

creased pupil transportation and their anxieties regarding the children's adjustment to new schools are likely to be channeled to the board through the Parent Teacher Association or other formal school related organizations. High schools usually have strong alumni support, around which strong opposition to school closure is frequently organized. They are likely to be external, formal or informal groups, especially those which support strong athletic programs at the school. The motivation of some individuals in opposing a high school closing appears to be more a concern for the loss of personal identity with the school and its activities than a genuine concern for costs or quality programs.

The feeling generated by school closings may be so deep and long-lasting that it causes a loss of support for the superintendent and the board, even though they made the proper decision in terms of programs and operating costs.

Acceptance

Acceptance of a school closing often depends on how the board and superintendent approach the problem and how effectively they communicate with the public. Involving potential critics in planning the school closing is a strategy used in some districts. If a closing is approached only from the "nuts and bolts" orientation with primary emphasis on such tangibles as costs, capacities, attendance areas and transportation, the chance of citizen resistance is great. Eisenberger¹⁵

¹⁵Katherine E. Eisenberger. "Closing a School: Some Ways to Ease the Trauma," School Management 18 (August-September 1974): 33-36.

maintains that a school closing should be seen as a "people problem" and that administrators should assign their highest priority to dealing with intangibles such as fear of the loss of reputation by good teachers, the loss of influence by parents and a lack of acceptance by pupils in a new school. She observes that when the intangibles which motivate citizens to resist school changes are neutralized, the tangibles can be dealt with and a smooth transition completed. A comprehensive plan for dealing with the intangible aspects of school closings is illustrated in the filmstrip, "Declining Enrollments and School Closings", produced by the American Association of School Administrators.

Other Planning Strategies

Two ingredients which appear necessary for effective planning in a declining enrollment situation are community involvement and communication credibility. The effective involvement of the community in planning for the use or disposition of surplus facilities often can change the emphasis from a negative to a positive attitude toward fewer pupils and fewer schools.

The citizens's task force Administrators and writers seem to agree that the involvement of representatives of such interest groups as parents, teachers, pupils and other lay citizens as an advisory task force for planning school closings is essential to a smooth transition. The task force should represent not only parents of both sexes, all racial and ethnic groups, and geographical areas of the district but also individuals with knowledge of real estate, government, business and community planning. An individual carefully selected may meet

several of these criteria, thus enabling the district to restrict the size of the task force to one that is manageable. The success of any task force is contingent upon the open-mindedness of its members and their ability to analyze data and make unbiased recommendations. Most writers feel that the need for community involvement outweighs the risks of unsuccessful task forces. Committee work enables a person to learn the facts and causes him to understand the need for action. Often, opposition is based on ignorance of "hard" facts.

Credibility and communication A crucial responsibility of the superintendent and the board is that of assembling up-to-date information and statistical data, and communicating them to the task force and to the public. The credibility of the board and administration in decision making must be beyond reproach. The Salt Lake City school board found the following practices to be helpful in preserving the credibility of the decision-making process:

1. All information was made public at the same time it was given to the board.
2. The board agreed not to hold executive sessions pertaining to the school closure process---only open meetings were held.
3. Copies of all reports were sent to community decision makers.
4. Tentative solutions were established which reflected modifications resulting from public hearings.
5. The media were kept informed at all times.
6. Parents and students were kept informed through newsletters and public hearings. Tentative solutions and modifications being considered were communicated to the public.¹⁶

¹⁶Ibid., p.6.

IMPLICATIONS FOR STAFFING

Reassignment and/or Reduction in Force

The relationship between declining pupil enrollments and staffing is not a direct one. The number of teaching positions is declining but not in the same proportion as student enrollments. More favorable pupil-teacher ratios, expanded pupil services, programs for pre-school children and continuing education have helped to slow staff reduction in some districts. If we are to believe the indicators, however, many districts will find a significant reduction in professional staff necessary during the next decade.

The number of classroom teachers in regular elementary and secondary schools in the United States is expected to decrease by approximately 20,000 between 1976 and 1985, primarily because of the declining pupil enrollments.¹⁷ The number of teachers at the elementary school level, the number of special services personnel, and the number of supervisors, however, have increased during the last decade. As a result, there is a lower pupil-teacher ratio.¹⁸ If the trend toward reducing the pupil-teacher ratio continues at its previous rate (from 27.9 in 1964 to 22.7 in 1974)¹⁹ and teacher turnover continues at a

¹⁷U.S. Department of Health, Education, and Welfare. Projections Of Educational Statistics to 1985-86, by Kenneth A. Simon and Martin M. Frankel. (Washington, D.C.: Government Printing Office, 1977), pp.48-50.

¹⁸U.S. Department of Health, Education, and Welfare, The Condition Of Education in the United States, pp.74-76.

¹⁹Ibid.

6 per cent separation rate, the impact of the sharp enrollment decline on demand for additional teachers will be somewhat offset. Based on the assumption that these trends will continue, the demand for additional certificated teachers in the United States will drop from 138,000 in 1976 to an estimated 109,000 in 1978, and will continue to drop until it reaches a low of 102,000 in 1980. Beginning in 1981, the annual demand for additional teachers is projected to increase, reaching 122,000 by 1982 and 168,000 in 1985, slightly more²⁰ than the 1975 demand of 167,000.

The number of students entering teacher-training programs is declining. Nevertheless, an estimated 70,000 trained teachers will be graduated in 1977 in the United States and fail to find employment in the classroom.²¹ Since 1971, however, the supply of beginning teachers has been dropping faster than the demand for beginning teachers, resulting in the smallest projected imbalance in supply and demand in six years.²² At a time when teachers in some subject areas are in oversupply, the demand for teachers in several fields at times exceeds the supply.

In the Fall of 1975, South Carolina employed approximately 1.26 per cent of the 2,203,000 public-school classroom teachers in the nation. Assuming that this ratio remains constant, and using United States Office of Education estimates of 2,122,000 teachers in the nation by 1980, South Carolina would need approximately 1,000 fewer teaching positions in 1980 than were staffed in 1975. Proposed additional

²⁰Ibid.

²¹Ibid., p.33.

²²Ibid., p.36.

kindergarten units and the provisions of the South Carolina Education Finance Act of 1977 which will effect a reduction of the pupil-teacher ratios in the first three grades may help to absorb some of the positions on the elementary level.

The dynamics of such variables as unequal decline, supply and demand, pupil-teacher ratios and higher per pupil costs are summarized succinctly in Population and You: A Primer for Superintendents, published by the Michigan Department of Education:

...A reduction in total enrollment will result in either a smaller pupil-teacher ratio with a corresponding higher per capita instructional cost, or in reduction of total professional staff.²³

When a school district is faced with circumstances which mandate a reduction of total professional staff, what factors must the board and superintendent consider? One of the basic considerations in the reduction of staff is how to be fair to the employees being terminated without impairing the quality of the educational program. Most school boards are prohibited by statutory and contractual provisions from arbitrarily selecting the teachers which it chooses to retain and discharging the others. Increasingly, teacher groups are placing the job security rights of teachers high on the priority list at the negotiating table.

Industry traditionally has used the "last hired-first fired" application of seniority in reducing work forces during unfavorable economic cycles. Staff reduction in school districts through the discharge of

²³ Michigan Department of Education. Population and You: A Primer for Superintendents, (ERIC Document Reproduction Service, Ed 114 996), p. 12.

the most-recently-employed may be an acceptable criterion of fairness to individuals but it may have also a harmful effect on the quality of the educational programs. Competence is not necessarily a function of experience; many beginning teachers are highly effective in the classroom. Discharge of most-recently-employed persons not only eliminates young teachers in mass without regard to their competence but also increases the median age of the staff. The higher salaries of senior teachers, in turn, result in an increase in the per-pupil cost of instruction. Nevertheless, despite costs and concern for the quality of programs, most policies pertaining to reduction in staff will be based on some form of seniority rather than on measures of teacher competence.

Other problems associated with staff reduction based on length of service are the disproportionate layoffs of minorities and women (particularly in administrative positions), problems in maintaining court-ordered racial balances in staffs, and problems in implementing affirmative-action hiring programs. As Louis Zlokovich, Assistant to the Berkley, California, Superintendent of Schools said, "When employment is down, affirmative action is down, too."²⁴

Educational Research Service (ERS), a nonprofit research firm sponsored by five national administrative organizations (including the American Association of School Administrators), developed a comprehensive checklist of items for consideration in developing policy

²⁴Robert Yeager, "Enrollment Dip Hinders Affirmative Action Plan," Nation's Schools 93 (May 1974): 16-17.

for a reduction in force. The list is included, with sample policies from various districts in several states and the District of Columbia, in an ERS Information Aid, "Local Policies for Reduction in Force."²⁵ Points to consider in developing reduction-in-force policy, according to the checklist, include seniority, "bumping rights," grievance procedures, sabbatical and long-term personal leave, re-hiring provisions, recall lists, substitute teaching and problems of minority staff imbalance.

Early retirement incentive programs may help solve the problems of declining enrollments and increasing costs by encouraging those at the maximum salary levels to retire early. Frequently, in such programs a stipend is paid the retiree, usually for consultant services. The saving to the district is the difference in salary of the retiring teacher and that of a younger teacher, less the stipend. The Pasadena Unified School District plan permits an eligible employee who is fifty years of age or older to retire early and to serve as a consultant to the district for a maximum of twenty days per year for up to five years or to age sixty-five, undertaking such tasks as staff development, orienting new teachers, and helping with testing programs. The person is eligible to maintain his medical insurance and is compensated as a consultant on a schedule based on his salary at the time of retirement.

Donald Thomas suggests staffing on mid-year enrollment projections

²⁵"Local Policies for Reduction in Force" (Arlington, Va.: Educational Research Service, Inc., April, 1975), pp.1-18.

rather than fall projections for districts with rapidly-declining enrollments and for high schools which lose sizeable numbers of students during the year.²⁶ He notes that some districts employ a selected number of teachers on a one-semester basis. William F. Keough, Jr. suggests the strategy of offering "one or two-year termination contracts to new teachers, thereby allowing the district to declare openly that teaching positions may not be available in the immediate future."²⁷

Apparently, sabbatical and long-term personal leaves are encouraged by some districts and discouraged by others. Those districts that encourage sabbatical and long-term personal leaves see them as means of immediately reducing staffs. On the other hand, Keough reports that some districts have placed a moratorium on leaves, thereby "reducing the number of teachers returning to claim positions vacated when enrollments were higher."²⁸

In summary, the literature seems to suggest the following implications for planning.

1. Staff attrition rates and replacement needs should be projected for a period of several years to permit districts to develop long-range staffing plans which reflect a reduced student population and increased fiscal constraints.

2. Mandated reductions in force should be avoided if possible by

²⁶Donald Thomas, "Five Ways to Save Money with Declining Enrollments," paper, no date.

²⁷William F. Keough, Jr., "How to Make the Best of Your School District's Enrollment Slide," The American School Board Journal 162 (June 1975): 41.

²⁸Ibid., p.6.

reducing staffs through early retirement incentives, leaves, and selective replacements in attrition vacancies. Legal constraints may make early retirement impractical.

3. Staffing for midyear and the use of one- or two-year termination contracts may increase precision and allow more flexibility in staff planning.

4. Open communication with the local teachers' associations and plans for participation in the determination of staff-reduction procedures should be developed at the first indication of a mandated reduction in force.

5. The development by the school board of written policy pertaining to a reduction in force before the need for such policy occurs is probably the single most important consideration.

IMPLICATIONS FOR INSTRUCTION

What are the effects of declining enrollments on instructional programs? A relationship between enrollment declines and programs exists. Except in small systems where programs are immediately eliminated, however, it is usually indirect, relating first to staff and finance issues but ultimately affecting instructional programs. The loss of state and federal revenues which accompany declining enrollments creates a chain reaction which is likely to be felt first as a reduction in staff and followed by a reduction of programs.

The adverse effects on programs are usually seen in two dimensions: (1) comprehensiveness or quantity of curriculum and (2) the quality of instruction.

Declining enrollments may reduce the quantity or comprehensiveness of the instructional program by:

1. Some advanced courses not being taught because enrollment falls below a required minimum. Small high schools are especially vulnerable. Typically, they lose speech, foreign language, advanced mathematics and science courses.
2. Reduction in the quantity and scope of special programs, making impossible any effort to meet the diverse needs of students. The loss of programs for the talented and gifted, and resource programs for the underprivileged, further reduce the holding power of schools and compound the adverse effect.
3. Cutbacks in pupil services that result in reduced student accessibility to psychological, social, and library and guidance services.
4. Fewer extended activities. There is a propensity to concentrate on cognitive skills at the expense of affective and psychomotor areas and non-varsity athletic and avocational programs.

The adverse effects in the quality dimension are less tangible

but of no less importance. The closure of schools because of low enrollments has an unsettling effect on teachers who may be transferred to new teaching situations. The strain of increased tensions and lower morale are often reflected in deteriorating administrator-teacher and teacher-pupil relationships. As Mattie Crossley says, "teacher dedication becomes less of a reality."²⁹ La Barbara Gragg sees these conditions as causing a drain of psychic and physical energies away from such activities as maintaining or improving the learning environment.³⁰ Donald Peckenpaugh sees the continued threat of loss of jobs causing teachers to feel insecure and creating negative climate for change.³¹

In districts with seniority provisions for layoffs and recall, young staff members will be the first lost and few beginning teachers will be employed. Both situations will contribute to the loss of fresh ideas and to an aging teaching staff. Affirmative-action plans and innovative multicultural programs are likely to be the first aspects of staff programs to suffer.

Teachers who are transferred or assigned responsibilities out of their best fields of certification often become insecure and sometimes dysfunctional, a situation which students quickly sense.

Some positive effects may be realized from declining enrollments

²⁹ ASCD News Exchange, 19(March 1977):6.

³⁰ Ibid., p.6.

³¹ Ibid., p.7.

through timely and appropriate planning by superintendents and boards. Karen Sieraski suggests that the structure and management of some school programs, or even entire school districts, should be reexamined and reform plans developed.³² Elements of programs known to be effective would be strengthened; undesirable elements would be eliminated.

Donald Thomas, superintendent of the Salt Lake City Public Schools offers more specific guidelines:

The first thing to do is decide the level of educational programs the district wants; then the board of education indicates that it approves this level of programs....then attach a budget to it. The next step is to consolidate the district in order to free up the dollars to match the budget.³³

Thomas indicates that in order to take such action he goes to the community with the proposition of either consolidating schools in order to preserve programs or curtailing programs in order to keep a school open. When people see that closing schools is related directly to the quality of education available to their children, consolidation meets less resistance. "We try to equate the closure of schools to the quality of the program and whenever a school is closed, a part of the program is preserved," says Thomas.³⁴

³²Karen Sieraski, "Implications of Declining Enrollments for Schools," School Leadership Digest (Arlington: Va.: National Association of Elementary School Principals, 1975), p.8.

³³Shrinking Schools (Dayton, Ohio: Institute for Development of Educational Activities, Inc., 1975), p.25.

³⁴*Ibid.*, p.26.

In summary, the effect of declining enrollments on instructional programs probably will vary with the degree of decline experienced by a district and the level of planning by the superintendent and the board. If a district experiences a sharp enrollment decline in a short period of time when adequate planning has not occurred, programs are likely to suffer. Advance planning involving community participation in the setting of program priorities can ease the transition and reduce the intangible "people problems." Nevertheless, the transition from an expanding to a shrinking system is likely to produce job insecurity and resistance to change among some staff members. The greatest damage to instruction may result from entrenchment; it can stagnate the learning environment.

A recent member survey made by the American Association of School Administrators identified the major three problems confronting school administrators as financing, cost reduction and dismissal of incompetent staff.³⁵ Declining enrollments affect each of these areas independently and collectively.

The relationship between declining enrollments and financing schools is complex and perplexing. In the past several decades, school districts have pointed to climbing enrollments as justification for increased operating budgets and for additional long-term debt. Because of declining enrollments, seemingly taxpayers should expect some relief, at least in terms of the rate of increasing expenditures. Such relief is not available currently and there is little reason to expect that it will occur, particularly in the near future. In fact, total expenditures are likely to continue to increase.

Administrators recognize that the relationship of expenditures to changing enrollments is non-linear, i.e., school expenditures cannot be reduced at the same time and at the same rate as enrollment declines occur. Contained in a report of the Illinois Task Force on Declining Enrollment is the estimate by one group of analysts that 10 to 15 per cent of school expenditures are fixed for one year; more than half cannot be reduced for a two- to five-year period; and adjust-

³⁵"Survey Cites Finances, Cost Reductions, and Staff Dismissal as Major Problems," School Administrator 34 (May 1977): 2.

ment of the remaining portion requires six to ten years.³⁶ Communicating the reasons for the nonlinearity to citizens and winning their support for continuing financial needs during declining enrollments is no small challenge to boards and to superintendents.

As was pointed out in testimony before the Subcommittee on Elementary, Secondary and Vocational Education of the United States House Committee on Education and Labor, the interdependence of the states and local school districts in school funding is a basic factor determining the degree to which declining enrollments affect school districts.³⁷ Nationally, the public schools are financed by a combination of federal funds (9 per cent), state funds (42 per cent), and local funds (49 per cent). The percentage of the total education expenditure from each of these sources, however, varies greatly from state to state. In 25 states, more than half of the non-federal revenue receipts is provided by the state. South Carolina is one of these states; the state's share of non-federal public school revenues for 1975-76 was 61.7 per cent.³⁸

All finance plans are based directly or indirectly on pupil count in some form: pupil enrollments, membership, average daily attendance or adjusted instructional units. Therefore, any decline in enrollment eventually produces a decline in state financial support.

³⁶Illinois Office of Education, "Illinois Task Force on Declining Enrollment," (Springfield: Office of Education), p.197.

³⁷U.S. Congress, House, Committee on Education and Labor, General Issue on Elementary and Secondary Education, Hearing before a subcommittee of the Subcommittee on Elementary, Secondary and Vocational Education on H.R. 15. 95th Cong., 1st session, 1977, p.116.

³⁸Ibid., p.117.

The greater the portion of funds coming from the state the more sensitive the school district is to fluctuations in state funding levels. Thus, districts with high levels of state funding are affected more by revenue decline tied to declining enrollments than are districts which receive higher levels of funding from local sources. Ironically, districts with high ratios of local-to-state funds frequently benefit from enrollment decline because local tax revenues for schools remain constant or increase, thereby generating more dollars per pupil.

Because of the relatively high level of state-to-local funding under the current South Carolina flat-grant finance plan, the effects of declining enrollments are potentially critical for some of the state's districts. The percentage of revenue for general operating funds (excluding federal funds) coming from local sources ranges from a low of 12 per cent in one district to a high of 58 per cent in another.³⁹ The total expenditure (local, state and federal) of the district with the lowest local support is only 63 per cent of the total expenditure of the district with the highest local support level. Thus, the fiscal impact of declining enrollments can be much greater on one district than on another even if both districts should lose the same number of pupils.

The full implementation of the South Carolina Education Finance Act of 1977 should tend to equalize the effect of pupil loss in those districts operating at the foundation program level. Even then, how-

³⁹South Carolina Department of Education, Rankings of the Counties and School Districts of South Carolina, 1975-76, (Columbia: Department of Education, January 1977).

ever, the fiscal impact of decline will remain significant for at least a brief period of time. Fixed costs such as insurance and contractual agreements cannot be reduced in proportion to enrollment decline. Operations and maintenance costs are not related closely to enrollment and may increase while enrollments and allocations drop. The reduction in the number of teachers with lower salaries will increase the per-pupil expenditure. In the long term, however, staff reductions and building closings eventually will bring down total expenditures as measured in constant dollars. Advance planning at the district level can reduce the time lag between short-term deficits and long-term benefits.

IMPLICATIONS FOR FACILITIES

The effect of the enrollment decline on educational space is gradual. The appearance of an empty classroom here and there provides welcome relief in school districts with overcrowded schools and temporary classrooms. Released space is utilized quickly in providing improved physical conditions for curriculum enrichment, media centers, pupil services, administrative offices and storage. In many districts, however, space needs are being satisfied and too much surplus space of the wrong type and in the wrong location is causing problems for boards and administrators. Because of spiraling operating and maintenance costs, such options as closing off part of a building or lowering the teacher-pupil ratio through local funds becomes impractical. The need to consolidate the scattered empty classrooms and close a school becomes a reality.

Before a school is closed, the question of what to do with the building should be considered. The architecture and location of most schools limit their use to few other purposes and the cost of converting the buildings to other uses is often prohibitive. Legal and administrative constraints also may affect the disposition of public property.

Several options are open to boards in determining the logical choice for disposing of a specific building. Among the options used by various districts are the following:

1. "mothball" the building for future use;
2. convert the building to other educational use;
3. permit interim use by other governmental agencies; and

4. lease, sell or dismantle the building.

According to a survey conducted by the Education Facilities Laboratory, "mothballing" may be the best option where there is evidence of potential growth or recycled housing which will bring in a new school-age population.⁴⁰ The size and location of the site and the age, condition and type of construction of the building are factors to consider in retaining ownership of a unit. The obvious advantage of "mothballing" is having a building ready for use in the event it is needed. With some demographic evidence emerging in 1977 to support an upswing in the fertility rate and a subsequent increase in elementary school enrollment in the mid-1980's, "mothballing" seems a viable consideration.

The critical question, of course, is whether or not the "mothballed" building is in the place where it will be needed a decade hence. The disadvantages of "mothballing" include problems of vandalism, cost of maintenance, and the negative attitude prevalent in some communities concerning idle public buildings. A detailed list of the tasks to be completed in mothballing a building is included in a planning guide developed by the University of the State of New York and the State Education Department. The reference is listed in the bibliography of this booklet.

Other educational uses of buildings studied in the Survey of the Education Facilities Laboratory include a variety of possibili-

⁴⁰ Fewer Pupils/Surplus Space (New York: Educational Facilities Laboratories, Inc., 1974), pp. 28-31.

ties ranging from preschool, Headstart and kindergarten programs to day-time adult education and career education projects. Alternative schools and special education centers are possible options. Administrative services such as transportation and health have been consolidated in some districts and housed in former schools. In South Carolina, the use of surplus classrooms to accomodate the expanding kindergarten programs in some districts may be feasible. When appropriate consideration is given to the size, location and design of a kindergarten, however, the adaptability of space in many schools for kindergarten use is limited. Ideally, kindergarten units should contain more space than the typical classroom, should be located near automobile and bus "drops," and should open into enclosed playyards. Toilet facilities and other plumbing requirements normally not found in other classrooms are needed in kindergarten units.

Interim use of buildings by other agencies and commercial rental options are other possibilities. Short-term use of buildings by non-education agencies or commercial firms may be practical in some cases. An advantage of interim occupancy lies in shifting the maintenance cost to the occupant while retaining long-term control over the property. Rental fees may or may not be charged, often depending on whether or not the tenant is a non-profit agency serving the community or a commercial enterprise. Maintaining an occupancy rate sufficient to defray costs is sometimes impossible; as a result, deficits are incurred. Disadvantages of renting include the question of whether schools should be in the real estate business and the feeling by many people that all excessive public property should be sold

and placed back on the tax rolls.

Sale or destruction of school buildings may be the best and only option when, in the judgment of the school board, a facility is unlikely to be useful to the district in the near future. The sale of a school building and site is sometimes difficult and slow. Legal and administrative jurisdiction constraints may present obstacles to a direct sale. Schools are usually located in residential neighborhoods, and zoning and antipollution restrictions may discourage commercial or industrial development. Furthermore, the design of the typical school building does not lend itself to commercial utilization.

The legal requirements which govern the sale or lease of school property vary from state to state and from district to district. In South Carolina, trustees may sell or lease real or personal school property with the consent of the county board of education. In a county which does not have a county board of education, consent of the governing body of the county must be obtained by the trustees prior to the sale or lease of school property.⁴¹ Furthermore, the disposal of parcels of land which were purchased for public-school purposes by boards of trustees after 1952 and in which state funds were used, is subject to prior written approval of the State Board of Education.⁴²

⁴¹S. C. Code of Laws, 1976, Section 59-19-250.

⁴²S. C. Code of Laws, 1976, Section 59-19-190.

CONCLUSIONS

Continuing enrollment decline will affect South Carolina school districts in varying degrees during the next five to ten years. Some districts will experience stable or slightly declining enrollments and will benefit from the surplus space. Superintendents and boards of districts which experience moderate to sharp enrollment decreases will face new challenges in developing equitable policies for staff reduction and in improving programs while condensing them. The development of mutual understanding with the community concerning questions of school closures, attendance line changes and reorganization of grade structure will require large investments of administrative time and high levels of creative leadership.

Demographic forecasting will remain an essential element in predicting the degree to which specific districts will be affected by enrollment changes. The generation and distribution from the state level of knowledge about demographic trends will be essential to planners at the district level, but familiarity with local circumstances will also be necessary. Every district will need to build a data base and develop the capacity for detailed analysis of local conditions in order to formulate policy effectively.

APPENDIX A

Additional Information

The following publications are recommended as sources for additional information on declining enrollments.

1. American Association of School Administrators. Declining Enrollment: What to do. Arlington, Virginia: AASA, 1974.

This publication outlines a plan which school districts may use in identifying the early symptoms of decline and in preparing a community for school closings. A series of questions and answers suggests ways of overcoming problems associated with communication, reduction in personnel and closing facilities. The appendix contains a format for predicting enrollments based on a cohort survival technique.

2. Educational Facilities Laboratories. Fewer Pupils/Surplus Space. New York: EFL, 1974.

This publication is based on an EFL field survey of more than 100 school districts in 40 states. School officials responded to questions concerning enrollment projections, excess space and plans for its use. The relationship between population characteristics, mobility and school enrollment are treated in depth with emphasis on the process of arriving at decisions on whether or not to close a school.

3. Educational Facilities Laboratories. Surplus School Space: Options & Opportunities. New York: EFL, 1976.

This publication is addressed primarily to non-professional educators-school board members, advisory committees, PTA's, taxpayer and similar groups. The major thrust is toward the effective utilization of surplus school space by school and community groups. Senior citizens centers, art centers, libraries and recreation facilities are examples of community use of converted school space. The cost of conversion and operation and arrangements for sharing, renting and leasing are discussed.

4. Educational Research Service. "Local Policies for Reduction in Force", ERS, April, 1975.

This pamphlet includes a list of items for consideration when a reduction in staff becomes a possibility. Selected policies and guidelines from several states and the District of Columbia relative to staff reduction are included.

5. IDEA Occasional Paper. "Shrinking Schools". Dayton, Ohio: IDEA, 1975.

This is a report on a conference sponsored by the Institute for Development of Educational Activities, Inc. which examined the causes, characteristics and problems associated with enrollment decline. Suggestions of how to get at the problem and reports of how some school districts have reacted to decline are included.

6. P. A. Morrison. Report on the Demographic Context of Educational Policy Planning. (Santa Monica, California: ERIC Document Reproduction Service, ED 119379)

This report describes the demographic analysis that should form the basis of educational policy making. A section of the report relative to long-term adaptation within the labor market for school teachers may be of special interest to school administrators.

7. New York State Education Department: Enrollment Trends Programs for the Future. Albany, N. Y. New York State Education Department, 1976.

This publication outlines six major steps involved in the planning for decline and suggests two additional steps needed for adapting the process to a specific school district. Of special interest to school administrators is a detailed list of tasks involved in mothballing a school building.

8. Allen Odden and Phillip E. Vincent. The Fiscal Impacts of Declining Enrollments. Denver: Education Commission of the States, 1976.

This publication examines five aspects of declining enrollments in the states of Michigan, Missouri, South Dakota and Washington. The following aspects are reported: (1) the magnitude of the problem, (2) the type of school district affected by declining enrollments: (3) the wealth, tax rates and state aid characteristics, (4) expenditures and effect on personnel and (5) minority composition of school districts.

9. Donald Thomas, Five Ways to Save Money with Declining Enrollments. (Salt Lake City, Utah: ERIC Document Reproduction Service, ED 117831)

This paper suggests strategies for saving money during declining enrollments. Staffing for mid-year projections, early retirement plans and the decentralization of budget accounts are discussed.